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FILLING-STATION CHAINS

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FILLING STATION CHAINS

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FILLING STATION CHAINS

INTRODUCTION

This report on the operations of filling station chains is one of a series of reports presenting detailed analyses of the activities of retail chains during the year 1930. A filling station has been considered part of a chain only when it was actually controlled and operated by a central organization, the employees being employed on a salary or commission basis. Many of the gasoline companies in Canada during 1930 owned stations which were rented to individual operators who carried on their own business. These have been designated "leased stations" and are not considered as part of a chain but are analyzed separately in this report.

There were 28 filling station chains in operation during 1930, and they operated 743 stations which had total net sales during the year of \$14,875,440. Stocks on hand at the stations on December 31, 1930, valued at cost, amounted to \$372,642. There were 1,881 full-time employees who received \$2,214,564 during the year while 212 persons, employed on a part-time basis, received \$96,240.

Definition and Classification of Chains

For this Census, a group of four units or more, under the same ownership and management and carrying on the same or similar kinds of business, has been classified as a chain. Groups of two or three units owned and operated by one proprietor or firm have been classified as two- or three-unit multiples, not as chains, and are reported under these headings in the provincial retail reports. Chains have been classified as local, provincial, sectional and national, depending upon the extent of territory in which their branches are situated. Local chains are located entirely, or almost so, within the same town or city. Provincial chains have their units confined to one province. The units of sectional chains are spread over two or three provinces while national chains have their branches located in four provinces or more.

Growth of Chains

Of the 717 units of filling station chains whose ages could be determined, 177, or almost 25 per cent, were opened in 1930. Of the remainder, 340, or 47.4 per cent of the total number, were opened in the four preceding years - from 1926 to 1929 inclusive - while 200 stations, or about 28 per cent of the total number, were in operation prior to 1926.

Geographic Distribution of Units and Sales

From Table III, it is seen that 484 of the total number of 743 filling station chain units were located in Ontario and 145 were in Quebec. There were 66 units in the Prairie Provinces, 40 in the Maritime Provinces, and 8 in British Columbia. It must be borne in mind, of course, that these numbers refer only to stations actually operated by the chains themselves and do not include stations operated on a leased basis. This factor accounts for the small number of chain units reported in some provinces. The distribution of sales by provinces is also shown in Table III, and the sales of each province and of the Dominion are analyzed further by size of city. Of the total sales of \$14,875,440 made by all chains, sales in cities of 100,000 population or over amounted to \$9,314,433, or 62.6 per cent.

There were only two provinces, Ontario and Nova Scotia, in which filling station chains operated units in localities of less than 1,000 population. The 31 filling stations operated in these districts had total sales of \$357,590, or only 2.4 per cent of the total chain sales for the Dominion.

Station Operating Expenses

Filling station chain operating expenses are shown in Table IV. In addition to the amounts paid in salaries and wages, each chain was asked to report such items as taxes, insurance, maintenance, stationery and supplies, light, heat, power, interest on money borrowed for current business operations, and any other operating expenses. The cost of goods purchased for resale was, of course, excluded, as well as any items on capital account. The operating expenses reported include only those applicable to the retail stations themselves, and do not include the cost of transportation of goods to the stations. Head office salaries and other expenses are also omitted as these have been attributed entirely to the wholesale activities of the companies. Considerable correspondence was necessary to remove wide discrepancies in the expense items reported by different firms, but every effort was made to secure the most accurate data possible. Due to the lack of uniformity in accounting practices and to the difficulty in some cases in segregating retail operating expenses from the wholesale figures, these operating expense ratios should be considered only as indicative of the costs of operation of filling station chains.

For all filling station chains, total operating expense amounted to 25.11 per cent of net sales. Of this, payroll was 15.53 per cent of sales, and other station operating expense, including rent, was 9.58 per cent. Rent paid by the chains for leased premises amounted to 4.65 per cent of sales made in these premises.

When classified according to type of operation, it is seen that the lowest operating expense ratio, 16.65 per cent of net sales, was obtained by 9 local chains operating 61 stations and having total net sales during 1930 of \$1,617,945. These chains were purely retail organizations and operated no wholesale outlets. Most of these local chains were independent proprietorships, and the estimated value of proprietors' salaries amounted to an additional .86 per cent of sales, making a total operating expense of 17.51 per cent. The operating expense ratio of the local chains has been decreased considerably by the inclusion of one chain reporting expense items somewhat below the average of the others. Had this chain been omitted from the table, the total operating expense for the group (omitting proprietors' salaries) would have been 18.02 per cent instead of 16.65, as shown in the table. Payroll cost would have been 8.84 per cent and other operating expenses, including rent, 9.18 per cent. Rent in leased premises would have been 4.55 per cent of net sales in such premises instead of 3.66 per cent, as shown. Operating expenses for provincial, sectional and national chains were much greater than for local chains, the percentages being 27.46, 26.63 and 25.38 respectively. The higher payroll cost was, in large measure, responsible for the higher expense ratios.

When classified according to average sales per station, it is seen that chains having average sales per station of over \$30,000 operated on an expense ratio of 19.21 per cent of net sales, as compared with 35.34 per cent for those chains whose station sales averaged less than \$20,000. In many cases, chains opened a large proportion of their units during the year covered by the Census reports. To obtain the average sales per unit for such cases, by taking the ratio of total sales for the year to the total number of stores in operation, would have resulted in too small an average figure per station. In determining the average sales per unit for each chain, allowance was made for this factor by attributing to each organization

the average number of units in operation during the year.

Sales by Commodity Classes

Of the total sales made by filling station chains, 83.29 per cent represented the sale of gasoline and 13.49 per cent the sale of oil. Parts and accessories and tires and tubes amounted to only 1.18 per cent, and receipts from service amounted to 1.32 per cent of total sales. A breakdown by commodity sales is shown in Table V.

Middle Range Figures

The expense figures for filling station chains, already stated and shown in Table IV, were obtained by totalling the expense data given for all these chains and expressing this amount as a percentage of the total sales of the same companies. It will thus be seen that these expense figures are weighted averages where a large chain has more weight in determining the ratio for the group than a smaller organization. In Table VI, average figures are given where each chain has been given the same weight irrespective of its size. The average operating expense ratio for filling stations, by this method, is found to be 20.7 per cent of net sales as compared with 25.11 as obtained by the former method. Two other figures are shown for total operating expense in Table VI under the headings "Lower Limit of Middle Range" and "Upper Limit of Middle Range". The method followed in obtaining these three ratios will be explained.

The total operating expense of each chain (including salaries, rentals and other operating expense) was expressed as a percentage of its total sales. The set of total operating expense ratios thus obtained was then arranged in an array from smallest to largest. This array was divided into three ranges: the lower range, consisting of the first quarter of the figures and therefore including the smallest operating ratios; the upper range, consisting of the last quarter of the figures and including the largest ratios; and the middle range, containing the remaining half of the figures. The average of the middle range was then found. In this way, the extremely low and high figures, due to more or less exceptional circumstances, were omitted and the remaining chains were given equal weight in determining an average operating expense ratio. The "Lower Limit of Middle Range" and "Upper Limit of Middle Range" are the two values at either end of the middle range and serve to divide the array into three sections. Upon referring to Table VI, it is seen that the Lower Limit of the Middle Range for total operating expense was 18.2 per cent, and the "Upper Limit" was 24.8 per cent, and, as indicated before, the average of the middle range was 20.7 per cent. That is to say, one-quarter of the chains had an operating expense ratio of less than 18.2 per cent of sales, one-quarter had an expense ratio of more than 24.8 per cent, and the remainder had an expense ratio lying between these figures and averaging 20.7 per cent.

The other items in this table were obtained in a similar manner to that followed in obtaining the total operating expense figures. It must be borne in mind that the figures for each item were obtained by rearranging the data for each company in a different array, and neither all the high nor all the low figures were common to the same companies. The figures in any column, therefore, cannot be related to other figures in the same column, nor can the individual expense items be added to obtain the total operating expense figure shown.

In addition to giving a set of averages for filling station operating results, this middle range table also classifies the chains into three sections:

For each item mentioned in Table VI, one-quarter of the chains had figures less than the data given in the first column, one-quarter had figures greater than those in the third column, and one-half the chains had figures lying between these two limits and centering around the figure given in the middle column.

LEASED STATIONS

Not all the retail service stations owned by the gasoline companies in Canada are operated by the companies themselves. Many of the larger companies rent either all or part of their own retail outlets to independent proprietors, who carry on their own business and pay either a fixed rental for the premises and equipment or else an amount proportional to the gallonage sold. Stocks of gas and oil carried at these stations are confined to the products of the lessors. By this means, the gasoline companies secure outlets for the distribution of their products without assuming the responsibilities in connection with the operation of the service stations. Service stations operated under this system have been termed "Leased Stations" and are analyzed here.

In all, 1,355 stations were reported by the different gasoline companies as leased stations during 1930. Since these stations were operated independently, it was, of course, necessary to secure a report from each proprietor covering his business for the year. Lists of these leased stations were received from the various companies, but, due to the insufficient addresses in some cases and frequent changes in the personnel in others, it was impossible to identify all these stations with the lists supplied by the Census enumerators. Of the total number already mentioned, 888 were clearly identified as leased stations belonging to different gasoline companies, and an analysis of the reports furnished by the lessees of these stations is given herein.

For the Census of Merchandising and Service Establishments, each establishment was classified on the basis of the kind of business which it carried on. It is found that, of the 888 leased stations already mentioned, 68 reported themselves as automobile dealers where the sale of gas and oil was of secondary importance to the sale of other commodities. There were 157 establishments reported as garages, in which sales of gas and oil represented less than 70 per cent of the total sales, and in which receipts from repairs and accessories was an important item. There were 667 establishments which could be classified as filling stations and, for comparison with company-owned and operated stations, figures for these only should be used. These 667 stations had total net sales during 1930 of \$14,245,900, or an average of \$21,358 per station. There were 930 employees employed on a full-time basis and receiving a total salary of \$877,000 or an average of \$943 each. In addition, there were 544 proprietors reporting no stated salary and 202 proprietors who reported themselves as being on the payroll and who received a total of \$286,800. The average salary per proprietor was thus approximately \$1,420. The average salary for all station employees for company-operated stations, computed from the total number of employees and wages paid, was \$1,177. The 667 leased stations reported 199 part-time employees who received \$57,800 in salaries and wages, while the 743 company-operated stations reported 212 employees on a part-time basis, and these received \$96,240.

Of the 667 leased filling stations, there were 263 which reported that they extended credit to their customers. Total sales of these stations amounted to \$6,020,300, of which credit sales were \$1,577,600, or 26.2 per cent of the total. There were 82 stations with sales of \$1,121,600, which reported that they sold only for cash, while 322 did not indicate whether they sold on credit or not.

Operating Expenses of Leased Stations

Operating expenses of leased service stations are shown in Table VIII. Not all establishments were able to give full particulars as to their operating expenses, and the figures given are based upon returns received from 438 stations supplying the necessary data. These 438 stations had total sales of \$10,563,200, or average sales per station of \$24,117, and operated on a total operating expense ratio to sales of 21.12 per cent. Of this amount, payroll amounted to 12.98 per cent, and other operating expenses, including rent, amounted to 8.14 per cent. Rentals, as reported, were 3.96 per cent of sales made in these premises. Proprietors' salaries have been included in the payroll item, the average salary per proprietor having been obtained on the basis of data furnished by those firms reporting this information. When analyzed according to size of business, it is seen that the operating expense ratio increases rapidly once the annual sales fall below \$10,000, the greatest increase being in the payroll item. The lowest expense ratio was obtained by a group of 48 stations, having average annual sales of from \$30,000 to \$39,999. For these stations, total operating expense was 17.98 per cent of sales, of which payroll was 11.56 per cent, and other operating expenses, including rent, amounted to 6.42 per cent. For each size class, proprietors' salaries were included, estimated on the basis of those reporting such salaries in the same size interval. The average salary per proprietor ranged from \$900 per annum for the smallest size class to \$2,000 for stations having annual sales of \$50,000 or over.

Operating expense figures are also given for leased premises classified as garages. The average operating expense ratio for these establishments was 29.23 per cent of receipts, payroll amounting to 18.17 per cent, and other operating expenses 11.06 per cent.

LEASED SERVICE STATIONS

Sales by Commodities

Of the total sales made by leased filling stations, and analyzed in this report, 28.6 per cent could be broken down into commodity classes. These commodity sales are shown in Table IX, and it is seen that, of the total sales of leased stations classified as filling stations, 84.14 per cent represents the sale of gas and oil. This amount is further broken down, showing that the sale of gasoline was 74.5 per cent of the total and that of oil 9.55 per cent; tires and tubes accounted for another 5.45 per cent, and other parts and accessories and storage batteries amounted to 4.60 per cent. Receipts from repairs or services amounted to 3.74 per cent of the total receipts.

A breakdown by commodity classes is also shown for leased premises classified as garages. Here the sale of gas and oil amounted to 56.56 per cent of total sales, repairs and services 19.27 per cent, and the remainder represents receipts from the sale of parts and accessories, tires and tubes, and storage batteries.

Table I

FILLING STATION CHAINS

Summary of Filling Station Chains

Number of chains	28
Number of stations	743
Net sales, 1930	\$ 14,875,440
Stocks on hand, end of year, at cost	\$ 372,642
Full-time employees	
Male	1,874
Female	7
Salaries	\$ 2,214,564
Part-time employees	
Male	212
Female	—
Salaries	\$ 96,240
Total payroll reported	\$ 2,310,804
All other expenses, including rent	\$ 1,424,697
Total operating expenses, per cent to net sales	25.11
Number of stations in leased premises	157
Rent paid for leased premises	\$ 151,493
Net sales of stations in leased premises	\$ 3,258,516
Per cent of rent to sales in leased premises	4.65
Number of chains reporting credit	13
Total net sales of such chains	\$ 11,105,365
Net credit sales of such chains	\$ 2,292,911
Ratio of credit sales to total sales	20.65
Number of chains reporting they sell only for cash ..	2
Total net sales of such chains	\$ 263,442

Table II(a)

FILLING STATION CHAINS

Chain units classified by geographic location and date of establishment

Geographic Division	Total units	Per cent of total units	Date of establishment of units					Before 1926	Units whose ages cannot be classified
			1930	1929	1928	1927	1926		
Total, all divisions	743	100.00	177	130	138	41	31	200	26
British Columbia	8	1.08	7	-	-	-	-	1	-
Alberta	19	2.56	3	1	4	1	2	8	-
Saskatchewan	23	3.09	13	-	1	1	1	7	-
Manitoba	24	3.23	-	9	1	1	-	13	-
Ontario	484	65.14	103	87	96	33	20	123	22
Quebec	145	19.51	38	18	27	4	7	47	4
New Brunswick	12	1.62	1	6	3	1	1	-	-
Nova Scotia	28	3.77	12	9	6	-	-	1	-
Prince Edward Island	-	-	-	-	-	-	-	-	-

Table II(b)

Chain units classified by date of establishment and size of chain

	Total units		Units in chains of --					Less than 6 units
	Number	Per cent of total	More than 50 units	11-50 units	6-10 units	6-10 units	6 units	
Total, all units	743	-	535	100	77	77	31	
Less units which cannot be classified as to age	26	-	19	-	-	-	7	
Units classified as to age	717	100.00	516	100	77	77	24	
All units established --								
1930	177	24.69	135	13	20	20	9	
1929	130	18.13	76	35	18	18	1	
1928	138	19.25	92	29	15	15	2	
1927	41	5.72	35	1	4	4	1	
1926	31	4.32	26	2	-	-	3	
Before 1926	200	27.89	152	20	20	20	8	

Table III

FILLING STATION CHAINS

Units and sales, by provinces and size of locality

Provinces	All Localities			Units and sales in places with population of ---			
	Units	Sales \$	Per cent of total chainsales	Over 100,000		30,000 - 100,000	
				Units	Sales \$	Per cent of total chainsales	Units Sales \$
Canada, total	743	14,875,440	100.00	378	9,314,433	62.62	122 1,973,637 13.27
British Columbia	8	67,872	100.00	5	61,082	(X)	-
Alberta	19	139,668	100.00	-	-	-	16 84,006 (X)
Saskatchewan	23	428,111	100.00	-	-	-	19 365,900 (X)
Manitoba	24	416,309	100.00	23	410,717	(X)	-
Ontario	484	9,333,112	100.00	229	5,603,123	60.03	73 1,177,862 12.63
Quebec	145	3,676,749	100.00	121	3,239,511	88.11	6 147,280 4.00
New Brunswick	12	217,294	100.00	-	-	-	3 114,983 (X)
Nova Scotia	28	596,325	100.00	-	-	-	5 83,646 (X)
Prince Edward Island	-	-	-	-	-	-	-
<hr/>							
	10,000 - 30,000			1,000 - 10,000		Less than 1,000	
	Units	Sales \$	Per cent of total chainsales	Units	Sales \$	Units	Sales \$
Canada, total	126	2,063,109	13.87	86	1,166,671	31	357,590 2.40
British Columbia	1	2,332	(X)	2	4,458	-	-
Alberta	3	55,662	(X)	-	-	-	-
Saskatchewan	4	62,211	(X)	-	-	-	-
Manitoba	1	5,592	(X)	-	-	-	-
Ontario	93	1,557,808	16.69	65	784,548	24	209,811 2.24
Quebec	13	221,641	6.03	5	68,317	-	-
New Brunswick	6	88,053	(X)	3	14,258	-	-
Nova Scotia	5	69,810	11.71	11	295,090	7	147,779 24.78
Prince Edward Island	-	-	-	-	-	-	-

An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table IV

FILLING STATION CHAINS

Chain Operating Expenses

A. Chains classified by Type of Operation.

	Number of chains	Number of units	Net sales (1930) \$	Per cent of units opened in 1930	Operating Expenses						Rent in leased premises per \$100 sales in leased premises
					Total expenses \$	Per \$100 sales	Payroll \$	Per \$100 sales	Other operating expenses, including rent \$	Per \$100 sales	
Total, all chains.	28	743	14,875,440	23.82	3,735,501	25.11	2,310,804	15.53	1,424,697	9.58	4.65
Local chains	9	61	1,617,945	29.51	269,425	16.65	133,125	8.23 ^x	136,300	8.42	3.66
Provincial chains	11	161	3,025,699	19.88	830,879	27.46	469,177	15.51	361,702	11.95	5.27
Sectional chains	5	169	3,044,861	31.36	810,889	26.63	547,649	17.99	263,240	8.64	5.23
National chains	3	352	7,186,935	21.02	1,824,308	25.38	1,160,853	16.15	663,455	9.23	4.15

B. Chains Classified according to Average Sales per Unit.

			\$		\$		\$		\$		\$
Total, all chains.	28	743	14,375,440	23.82	3,735,501	25.11	2,310,804	15.53	1,424,697	9.58	4.65
Chains whose average sales per station were--											
More than \$30,000 ..	7	93	2,816,893	35.48	541,038	19.21	306,763	10.89	234,275	8.32	3.21
\$20,000 - \$30,000 ..	13	495	9,837,106	24.85	2,409,577	24.49	1,524,213	15.49	885,164	9.00	6.68
Less than \$20,000 ..	8	155	2,221,441	13.55	785,086	35.34	479,828	21.60	305,258	13.74	3.33

x In addition, the estimated value of proprietors' services amounted to \$13,950, or .86 per cent of total sales.

Table V

FILLING STATION CHAINS

Sales by Commodities

Total Sales, All Chains	\$ 14,875,440
Less amount which cannot be broken down into commodities	\$ 2,286,300
Sales further analyzed	\$ 12,589,140
	<u>Per cent</u>
Commodity	100.00
Parts and accessories46
Tires and tubes72
Gasoline, lubricating oil and greases, total	96.78
Gasoline	83.29
Lubricating oil and greases	13.49
Miscellaneous merchandise68
Fuel oil04
Service	1.32

Table VI

FILLING STATION CHAINS

	Lower Limit of Middle Range	Average of Middle Range	Upper Limit of Middle Range
Total number of stations	6	10	23
Total sales volume of chain	\$ 154,933	\$ 242,440	\$ 481,937
Average sales per station	\$ 17,215	\$ 23,032	\$ 29,766
Per cent of total number of stations opened, 1930	0.00	14.60	32.78
Payroll cost per \$100 sales	9.62	12.06	15.32
Rental cost per \$100 sales in leased premises	1.35	3.61	5.43
Other operating expense, not including salaries or rent	6.06	7.66	9.25
Total operating expense per \$100 sales	18.20	20.70	24.80
Average yearly salary per employee	\$ 860	\$ 1,091	\$ 1,307
Number of employees per \$100,000 sales	9.80	11.50	12.90

Since each item in this table was obtained independently, the figures in any one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanations on the method of obtaining these figures, see introduction.

Table VII

LEASED STATIONS

	Premises operated as automobile dealer establishments	Premises operated as garages	Premises operated as filling stations
Number of establishments	68	153	667
Net sales, 1930	\$8,406,300	\$3,368,100	\$14,245,900
Stocks on hand, end of year, at cost ..	\$ 698,100	\$ 155,100	\$ 456,400
Proprietors not on payroll --			
Male	35	115	541
Female	-	3	3
Proprietors on payroll --			
Male	46	63	202
Female	1	-	-
Salaries	\$ 94,300	\$ 94,500	\$ 286,800
Full-time employees --			
Male	550	320	903
Female	28	5	27
Salaries	\$ 816,600	\$ 352,300	\$ 877,000
Part-time employees --			
Male	31	49	192
Female	-	1	7
Salaries	\$ 12,700	\$ 17,000	\$ 57,800
Number of establishments reporting that they extend credit	44	49	263
Total net sales of such establishments.	\$6,699,600	\$1,144,400	\$ 6,020,300
Net credit sales of such establishments	\$3,040,400	\$ 461,300	\$ 1,577,600
Ratio of credit sales to total sales of such establishments	45.4	40.3	26.2
Number of establishments reporting that they sell only for cash	-	8	82
Net sales of such establishments	-	\$ 93,300	\$ 1,121,600
Number of establishments not reporting whether they sell on credit or not ..	24	96	322

Table VIII

LEASED STATIONS - OPERATING EXPENSES

Stations Classified According to Size of Business

	Number of stations reporting expenses	Net sales of such stations (1930)	Average sales per unit	Operating expenses						Rent in leased premises per \$100 sales in leased premises
				Total \$	Per \$100 sales	Payroll \$	Per \$100 sales	Other operating expenses, including rent \$	Per \$100 sales	
Leased Filling Stations, Total	438	10,563,200	24,117	2,231,110	21.12	1,370,910	12.98	860,200	8.14	3.96
Sales less than \$10,000.	287	509,100	5,852	201,300	39.54	129,900	25.52	71,400	14.02	8.20
Sales \$10,000 - \$19,999.	129	1,902,800	14,750	446,450	23.46	277,850	14.60	168,600	8.86	4.97
Sales \$20,000 - \$29,999.	108	2,655,000	24,583	546,350	20.58	345,450	13.01	200,900	7.57	4.21
Sales \$30,000 - \$39,999.	48	1,618,900	33,727	291,100	17.98	187,200	11.56	103,900	6.42	3.49
Sales \$40,000 - \$49,999.	31	1,390,600	44,858	285,880	20.56	151,180	10.87	134,700	9.69	3.40
Sales \$50,000 and over.	35	2,486,800	71,051	460,030	18.50	279,330	11.23	180,700	7.27	2.60
Garages, All Sizes.	129	3,103,000	24,054	907,030	29.23	563,930	18.17	343,100	11.06	4.90

Table IX

LEASED SERVICE STATIONS

Sales by Commodities

Total Sales, Leased Filling Stations	\$ 14,245,900
Less sales which could not be analyzed	10,174,300
Sales analyzed by commodities	4,071,600
	<u>Per cent</u>
Commodity	100.00
Automotive parts and accessories (except tires, tubes and storage batteries)	3.04
Tires and tubes	5.45
Storage batteries	1.56
Gasoline, lubricating oil and greases, total	84.14
Gasoline	74.59
Oils and greases	9.55
Radios and radio equipment	2.07
Repairs and services	3.74

Leased Premises Classified as Garages

Total Sales	\$ 3,368,100
Less sales which could not be analyzed	1,686,700
Sales analyzed by commodities	1,681,400
	<u>Per cent</u>
Commodity	100.00
Automotive parts and accessories (except tires, tubes and storage batteries)	11.34
Tires and tubes	10.85
Storage batteries	1.59
Gasoline, lubricating oil and greases, total	56.56
Gasoline	49.60
Oil	6.96
Radios and radio equipment39
Repairs and services	19.27



